

Slovenské pracovné priestory pod lupou: Ingishty z prieskumu CBRE a Alma Career



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O prieskumoch

Alma Career
Jobsindex Q1/2025

Prieskum
CBRE/Alma Career
09/2025

CBRE Global occupier survey 2024
CBRE CEE State of workplace 2025

Spokojnosť a motivácia ľudí v práci



33 %
spokojní
a motivovaní



5 %
spokojní, ale
nemotivovaní



21 %
nespokojní,
ale motivovaní



41 %
nespokojní
a demotivovaní

Hlavné zistenia

298 respondentov
17-30 September
prevažne z BA SK

69%
spokojných s
kanceláriami

Utorok
Streda

25%
využíva flexibilné
modely práce
(71% spokojných)

56%
tvrdí, že zamestnávateľ
podporuje work-life
balance

Zdroj: Prieskum CBRE/Alma Career 09/2025

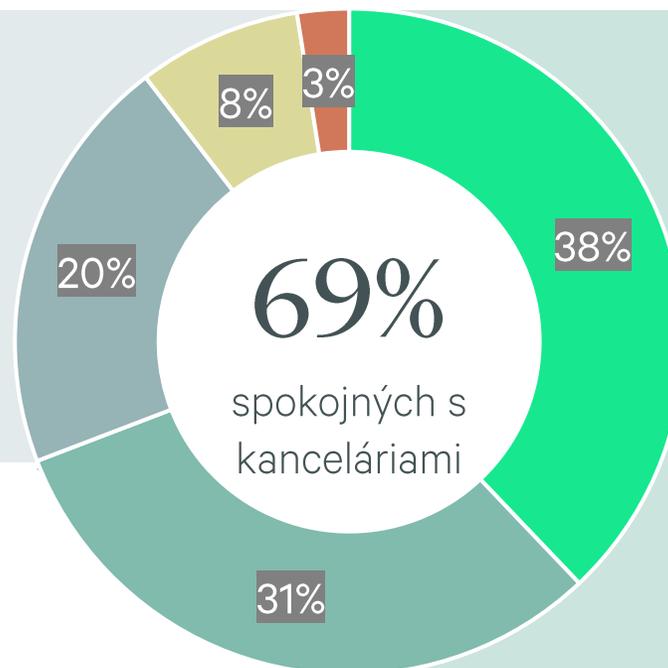
Čo spôsobuje ne/spokojnosť?

Negatívne faktory

Miera hluku	33%
Dostatok súkromia	31%
Priestory na oddych	29%
Priestory na sústredenie	23%

Pozitívne faktory

Dostatok denného svetla	39%
Čistota	37%
Usporiadanie priestoru	31%
Rokovacie priestory	31%



Zdroj: Prieskum CBRE/Alma Career 09/2025

■ Úplne spokojný/á

■ Skor spokojný/á

■ Aj spokojný/á aj nespokojný/á

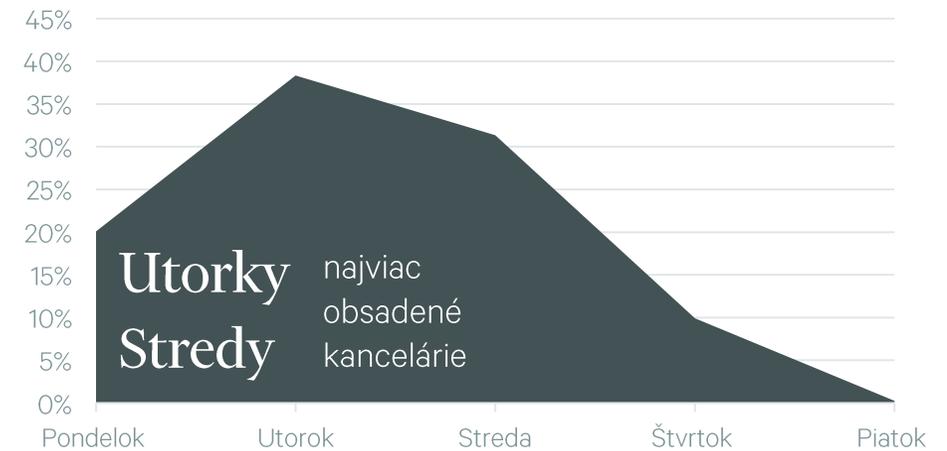
■ Skôr nespokojný/á

■ Úplne nespokojný/á

Práca, hybridne?

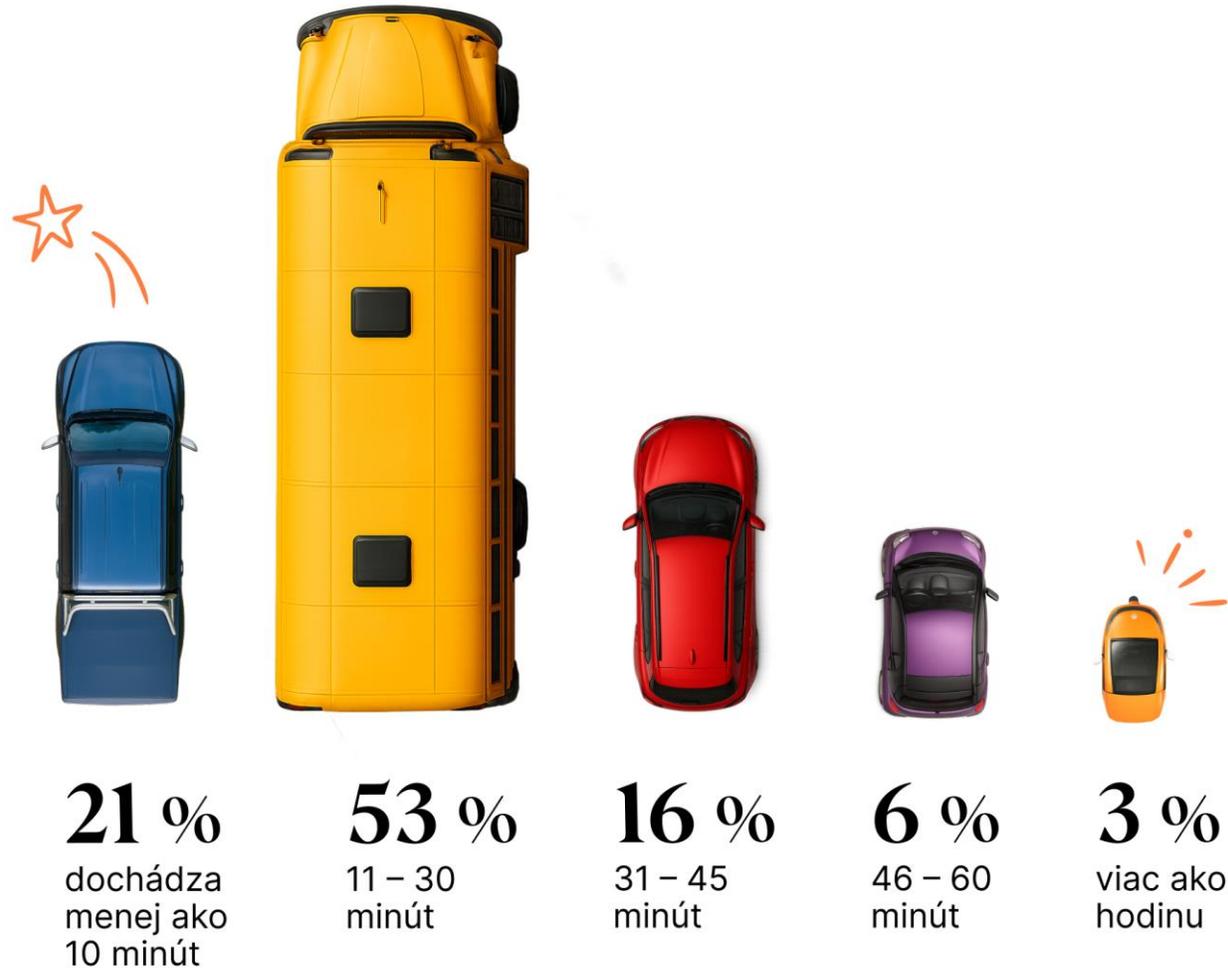


Zdroj: AlmaCareer JobsIndex Q1 2025



Zdroj: Prieskum CBRE/Alma Career 09/2025

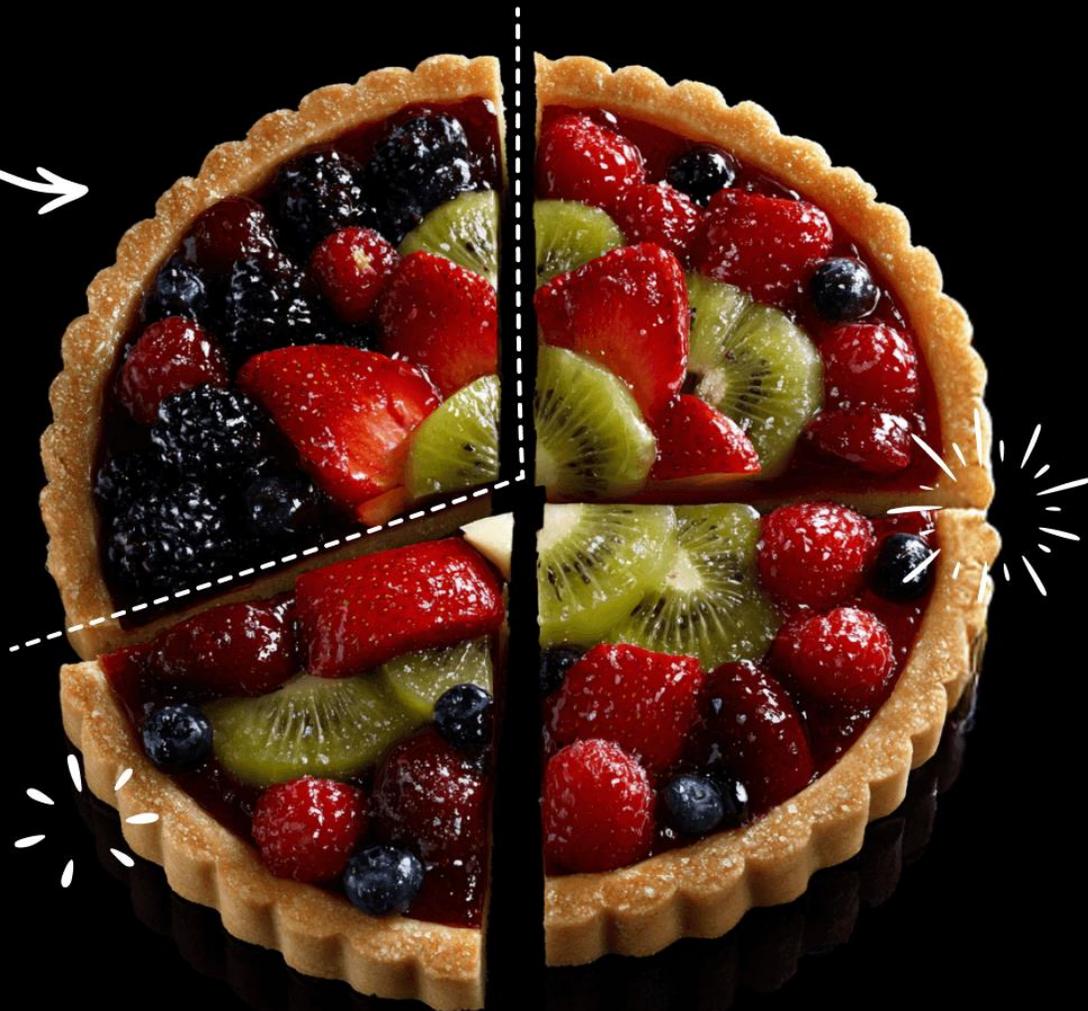
Trvanie cesty do práce pri každodennej dochádzke



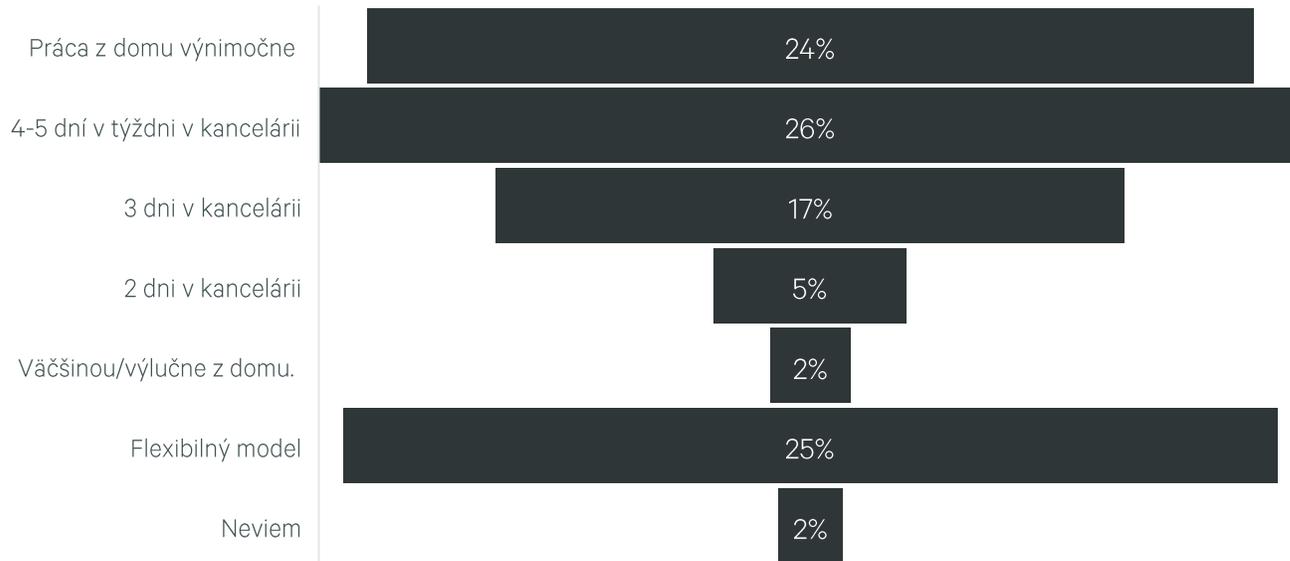
Zdroj: Prieskum pre aplikáciu Práca za rohom prostredníctvom portálu Platy.sk, 2025

28 %

l'udí chce pracovat
bližšie k domovu



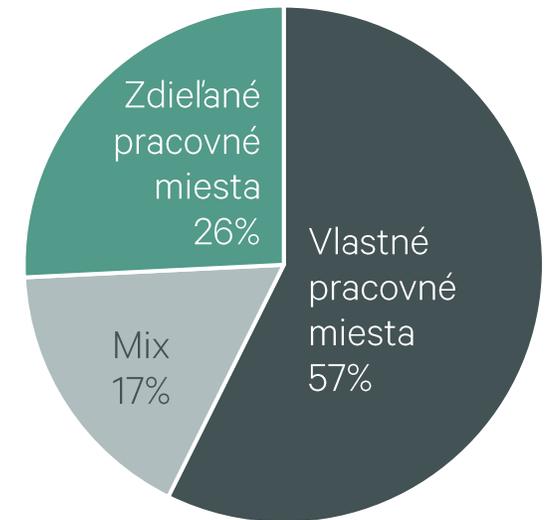
Práca, hybridne?



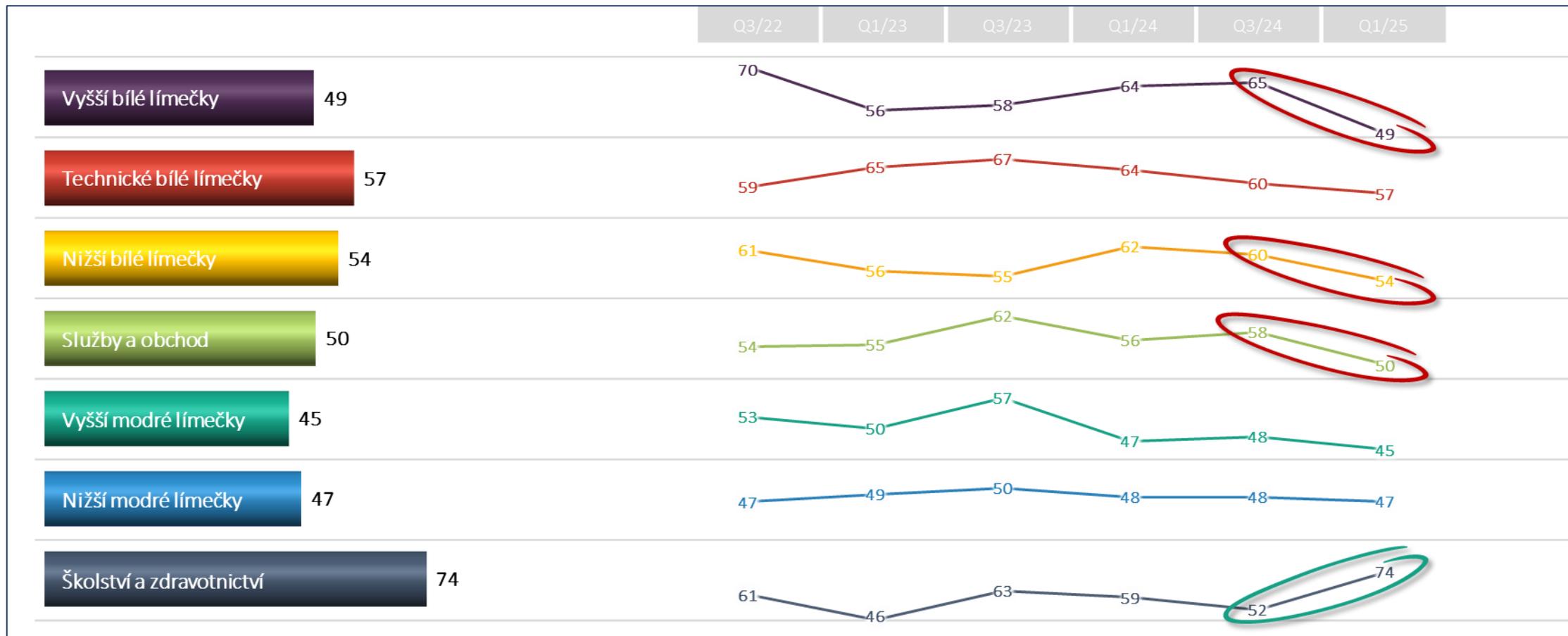
Zdroj: Prieskum CBRE/Alma Career 09/2025

67%

respondetov je v
office 3 a viac dní
v týždni

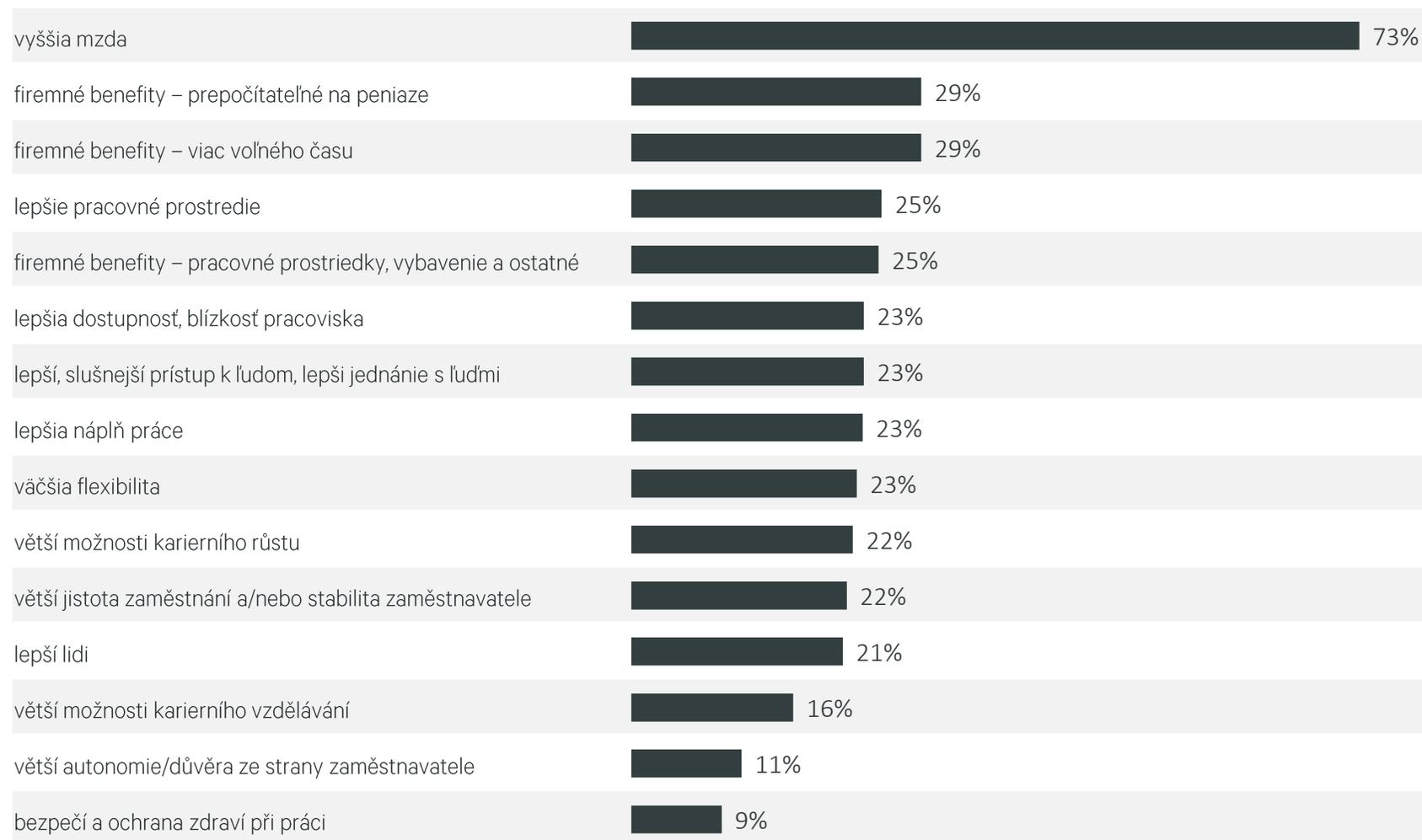


Work-Life Balance | Angažovanosť zamestnancov



Zdroj: AlmaCareer JobsIndex Q1 2025

Work-Life Balance Čo ovplyvňuje angažovanosť?



Zdroj: AlmaCareer JobsIndex Q1 2025

Odporúčania

Upravte / navrhnite priestory s dôrazom na akustiku, sústredenie, oddych a socializáciu.

Eliminujte „**peak days**“ a rozložte obsadenosť do celého týždňa.

Vytvorte **nefinančné** nástroje pre zvýšenie angažovanosti.

Zavádzajte jasné pravidlá a nástroje na podporu **flexibility**, posilnite **autonómiu** zamestnancov a manažérov.

Investujte do **wellbeing** programov, zlepšite **ergonomické** vybavenie a vytvorte priestory na oddych a regeneráciu.

Adaptive Spaces

CEE State of the Workplace Survey 2025

REPORT

Shaping
the initiatives
of tomorrow

CBRE RESEARCH
JULY 2025



Introduction



Office occupiers face a complex agenda of related, and sometimes competing, priorities:

- Managing new and still evolving patterns of office attendance
- Implementing cost and efficiency improvements at a portfolio level
- Refining strategies for digital technology and sustainability

All of these require detailed assessment of priorities and trade-offs and, increasingly, rigorous governance and data.

CBRE's CEE State of the Workplace Survey 2025 canvassed the views of over 50 companies on a range of topics including:

01

Measuring Office Utilization

02

Hybrid and Remote Work

03

Focus of Real Estate Teams

04

Diverging Approach to Future of Work

Over the past year, efforts to bring employees back to the office have met with some success, and utilization levels are rising. However, there is still a potential mismatch between the expectations of companies and those of employees as businesses look to increase attendance further.

Companies are looking to further optimize the size of their real estate footprint and are closely examining occupancy and utilization figures, but assessments of workplace effectiveness are hampered by limited measurement. Pressure from the labor market keeps some organizations more flexible than they would ideally like to when it comes to hybrid policies.

Key Findings

01 Measuring Office Utilization

Although overall office utilization seems to be growing, most companies are somewhat behind with the tools deployed and data granularity. This limits the comprehensive understanding of the requirements and the meaningful repurposing of space.

02 Hybrid and Remote Work

Organizations and their employees still seem to have a very different view on the purpose and required frequency of office presence. This is both a cause and effect of the lack of training for employees and managers as well as investment missing from the technology layer of the hybrid workplace.

03 Focus of Real Estate Teams

In order to support their goals of improving workplace experience and optimize resources, real estate teams seem to be increasingly interested in metrics formerly associated with HR.

04 Diverging Approach to Future of Work

Legacy vs. progressive: two distinct patterns seem to crystallize from the remnants of post-COVID workplace experimenting. Brick-and-mortar industries bet on returning to an upgraded version of the legacy business first approach while fast moving companies in life sciences, healthcare, financial services and energy embrace a more progressive human centric approach to defining the purpose of the modern workplace.



Utilization

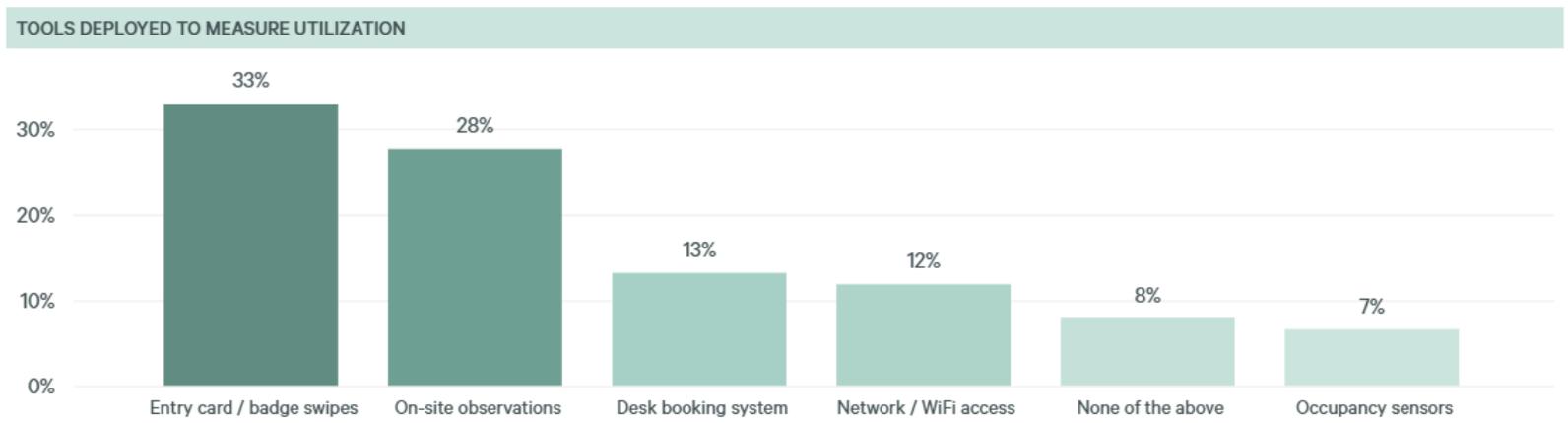
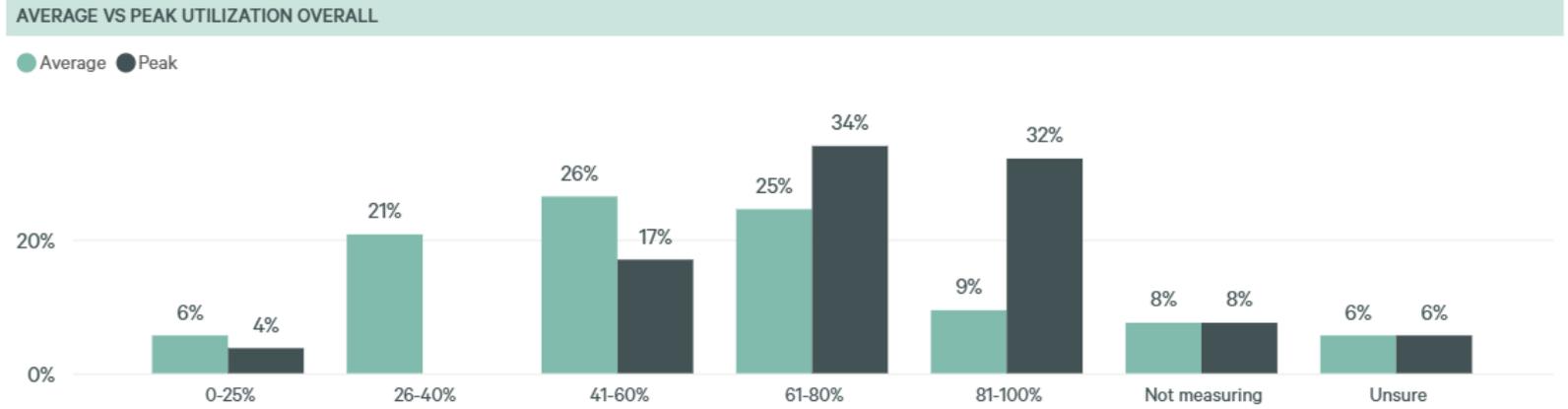
Over the past year, efforts to bring employees back to the office have met with some success. The proportion of companies reporting average building utilization of 61-80% has risen to 25%, from 14% last year. 1 in 10 report 81-100% utilization compared to none last year.

The proportion of companies reporting lower utilization has fallen. Less than 30% of companies are reporting utilization of 40% or below, compared with 33% last year.

Companies of 1,000 employees or more appear to be achieving more success, with 80% reporting utilization of 41% or higher. This seems to be because these companies both communicate and measure using more tools.

Solving for peaks

Average attendance is a useful metric, but peak utilization can present different challenges. The optimal pattern would see more companies (previously 50%) settling in the 61-80% range that is consistent with a sense of vibrancy. The ratio of companies reporting 81-100% peaks have risen from 26% to 35% meaning that **the rightsizing efforts of past may have reduced some offices too close to being overcrowded**. Many companies still need to try to modify the distribution of attendance, but **less than 10 in 1 deploy refined digital tools** like occupancy sensors or network access registry **to understand the nuances of space usage over generic attendance figures**.



Managing hybrid

Respondents still seem to be targeting slightly more office attendance compared to what they communicate and much more than actual turnup rates. Surprisingly **1 out of 10 respondents still don't manage attendance in a data driven way.**

It seems that companies in our region rely mostly on centralized, top-down communication when it comes to supporting hybrid work. Even though half of the respondents report employee turnup rates reflecting a significant amount of remote work, **less than 1 in 5 invest into technology or training** to support this.

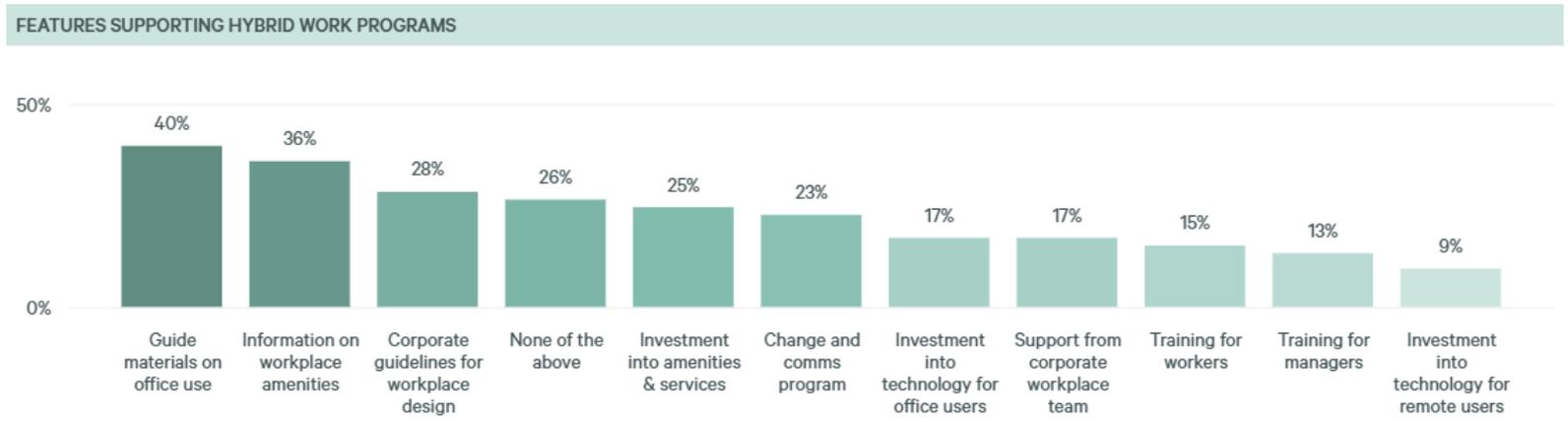
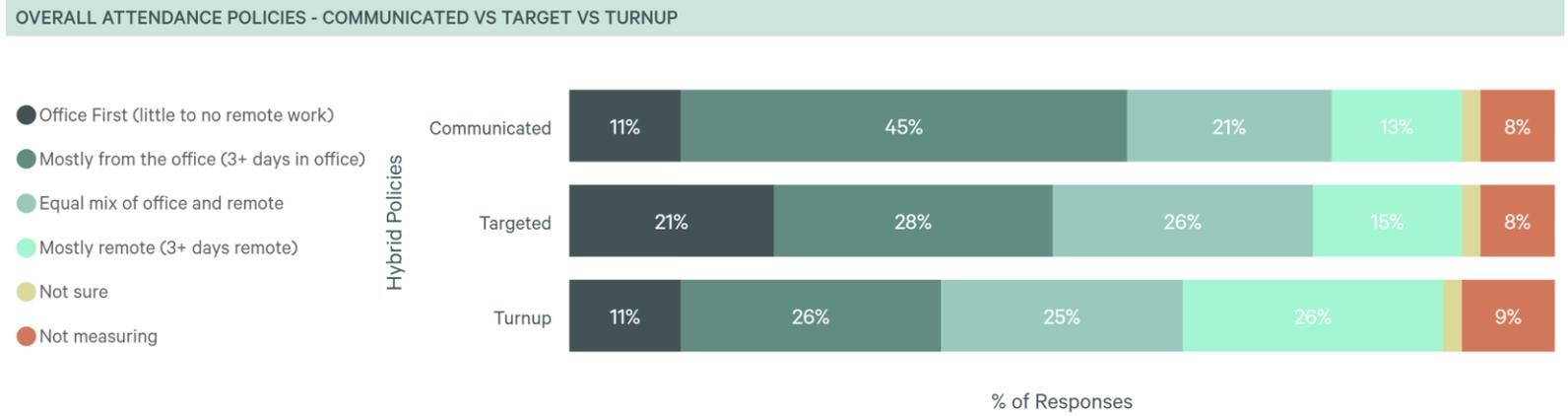
Even more interestingly, **a quarter of these organizations don't apply any** of the most commonly used supporting activities.

50%

Of office first companies communicate a more permissive approach

77%

Have no change and comms program in place to support hybrid work



Areas of focus

Looking at the focus areas of real estate teams it seems most experts in the CEE region are still caught between a rock and a hard place. **Trying to balance efficient use of resources** like space and budget while **pressured by employee expectations** towards better quality spaces and more remote work, these teams try to manage the flight to quality over quantity under extremely volatile conditions.

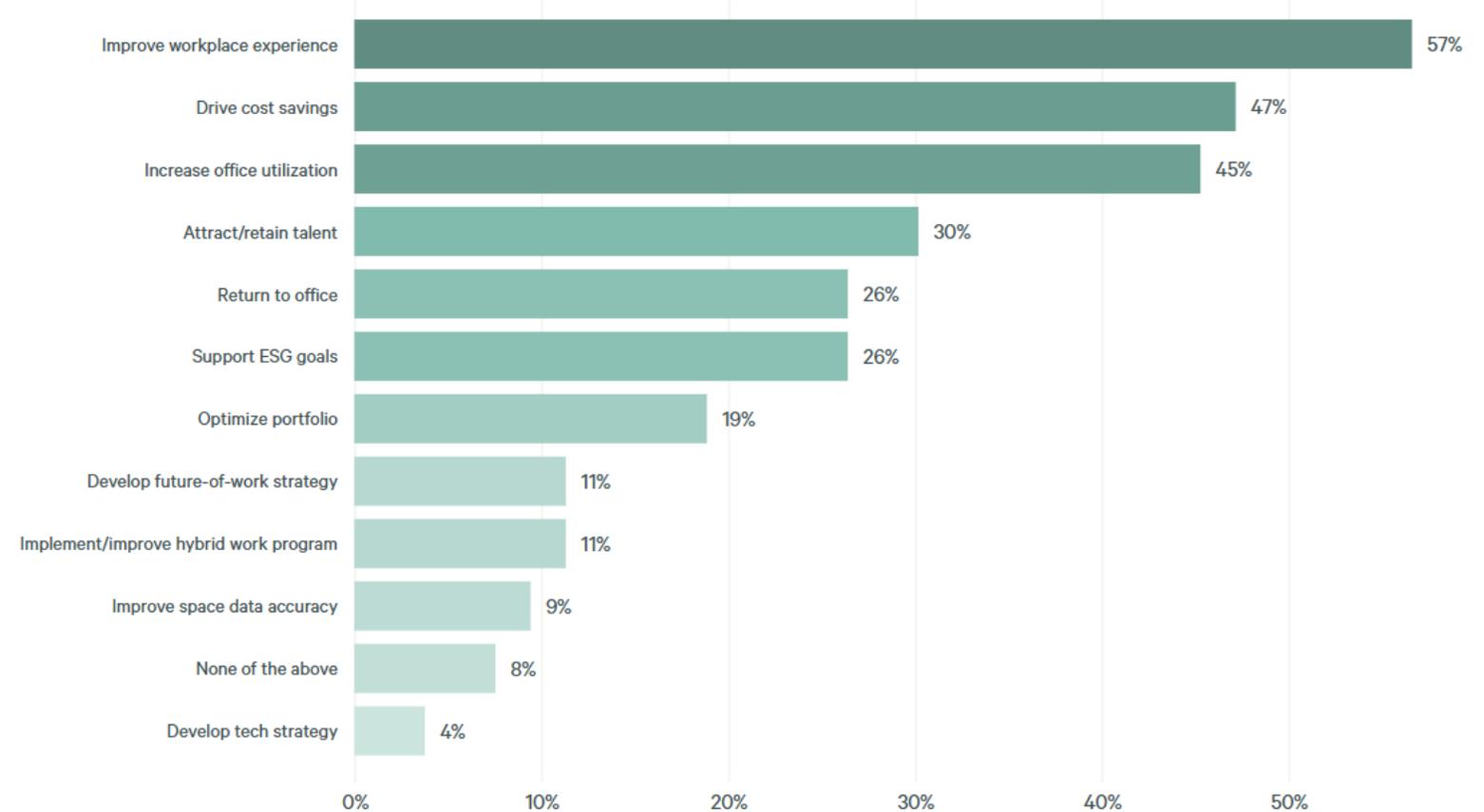
Uncertain future

Most of the organizations surveyed still seem to be in reactive mode. **Building a longer-term workplace or tech strategy and improving data accuracy is far from the top of their agenda.** They look to solve today's challenges and respond to the recent economic and labor market landslides through legacy approach.

Only 1 in 10

Focus on a strategic, data backed approach to achieve efficiency metrics

METRICS IN FOCUS OF REAL ESTATE TEAMS



Tracking metrics

The list of the key tracked metrics reflects the focal points of real estate teams: companies prefer to keep tabs on employee satisfaction and attrition rates, while evaluating utilization and show-up rates and cost of occupancy. The former helps understand how far they can go with trying to optimize latter. Since cost savings are high on their list of focus areas, they are **measuring indicators that help them eliminate employee turnover related and sunken real estate cost.**

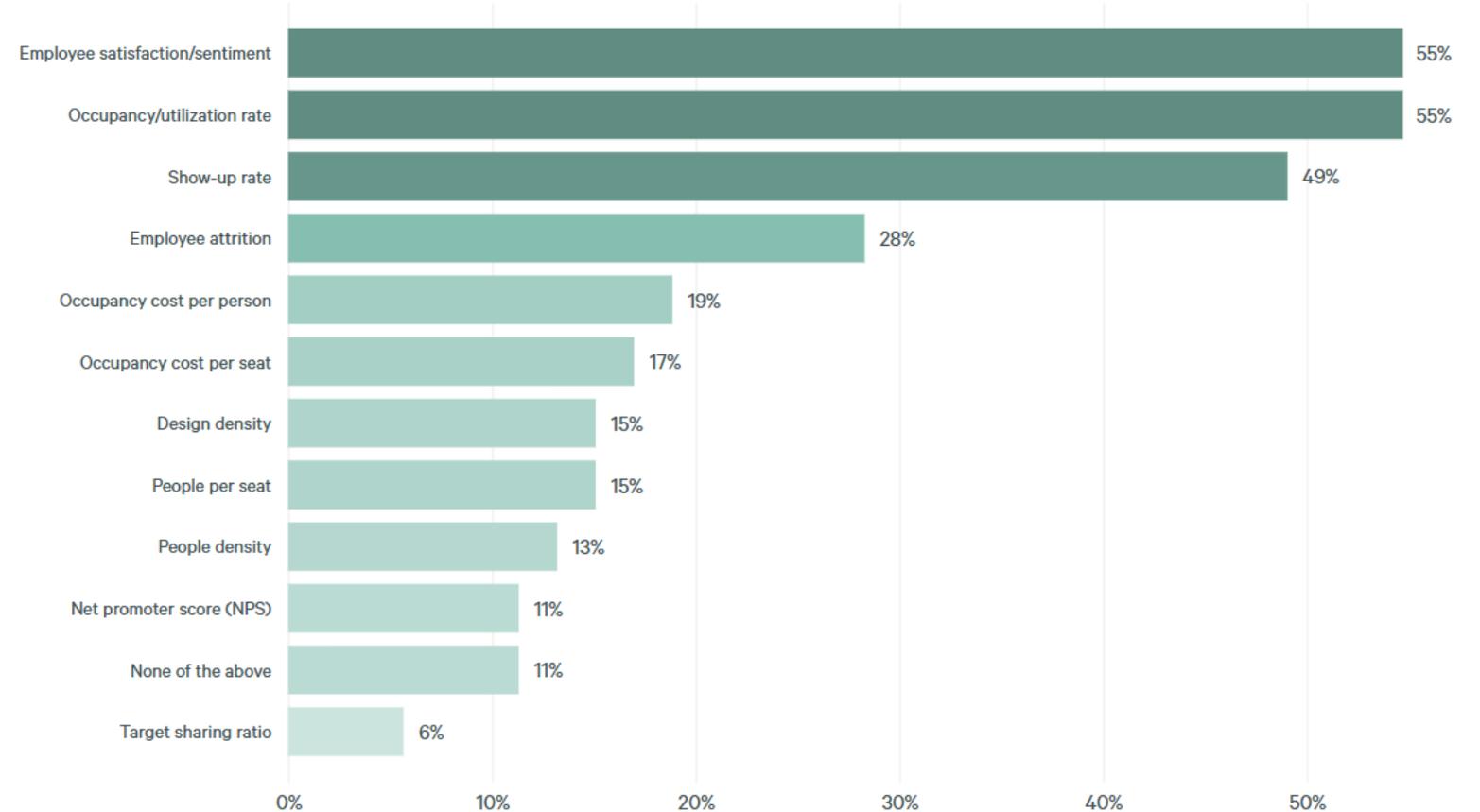
Over 50%

Track employee satisfaction to inform real estate decisions

11%

Don't track any of the key workplace metrics quoted

METRICS TRACKED BY REAL ESTATE TEAMS



Diverging approaches

It seems that there are two almost evenly present patterns emerging in the CEE region: those who bet on the legacy office standards and those who try to take a progressive approach on workplace experience and strategy.

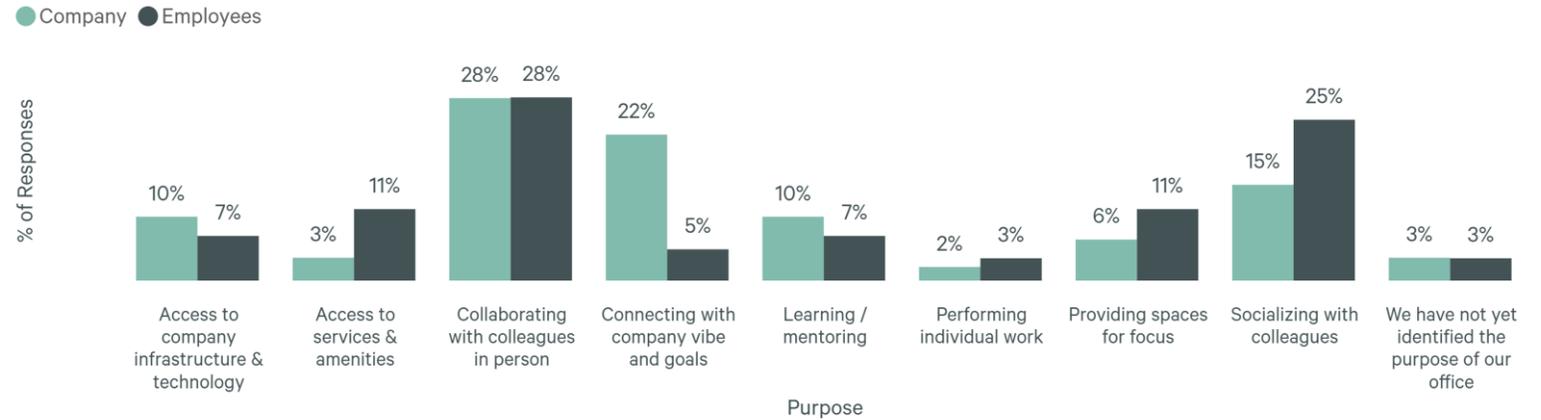
Legacy approach

The vast majority of respondents taking the legacy approach are companies with 500 or less employees in the countries surveyed. These companies are overrepresented in industries that rely more on brick and mortar. They tend to look at their workplaces from a **corporate infrastructure perspective** and most seem to bet on **office first policies**. These organizations seem to allow for less flexibility and are conservative in their approach towards offices.

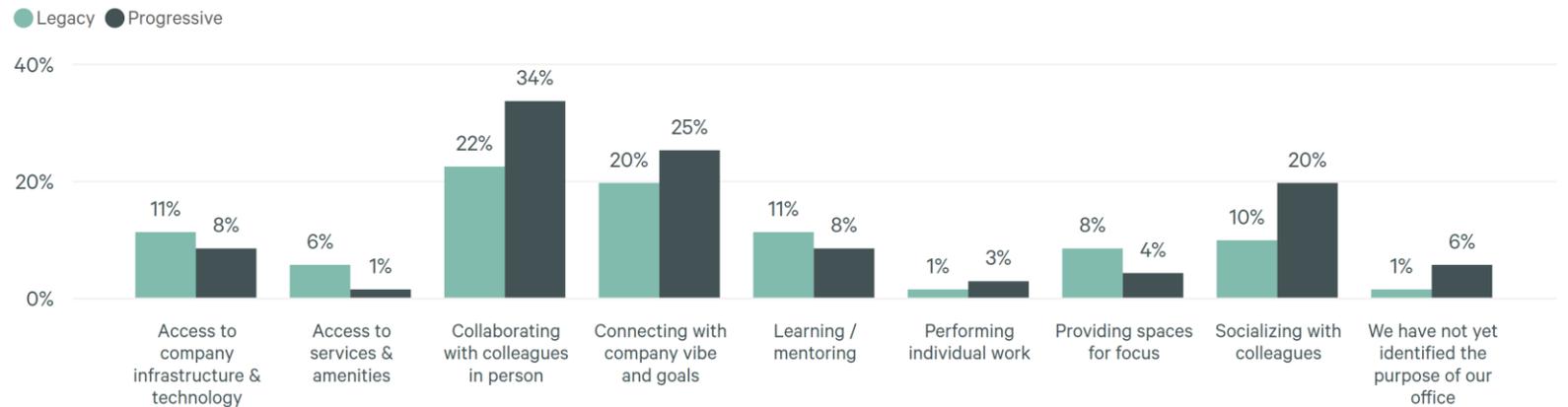
Progressive approach

Companies taking the progressive approach can be found in all sizes and are overrepresented across fast moving industries often facing disruption, like Technology, Financial Services, Energy or Life Sciences / Healthcare. These organizations are focused on efficient use of resources and take a **community centric approach** on office use. Driven by employee experience and pressured by labor market expectations they're more likely to **focus on the social aspects** of the workplace while being more flexible and willing to experiment more with their approach.

PURPOSE OF HAVING AN OFFICE FOR COMPANY VS FOR EMPLOYEES



PURPOSE OF HAVING AN OFFICE - LEGACY VS PROGRESSIVE APPROACH



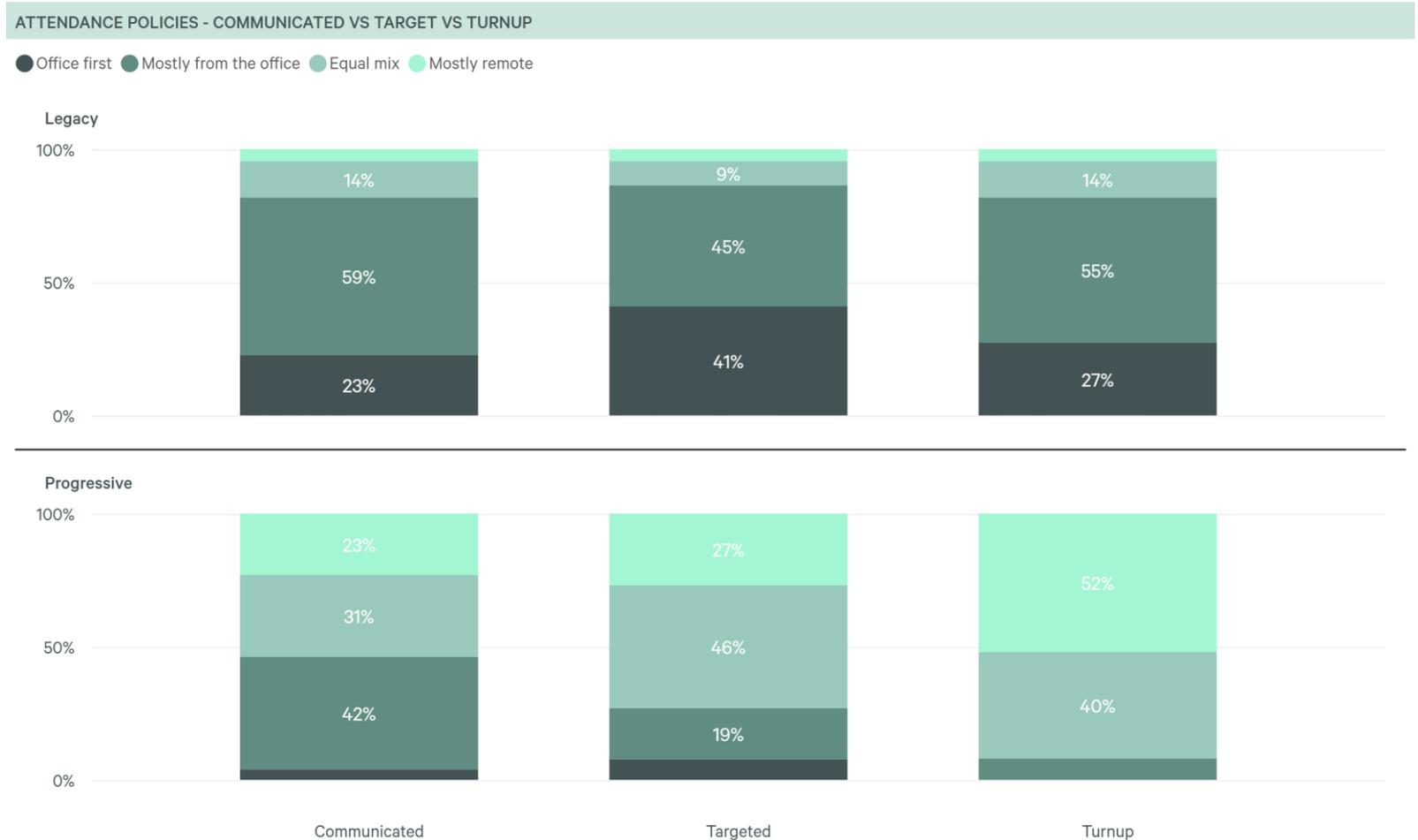
Attendance targets

Legacy approach

Companies with the legacy approach seem to minimize remote work and expect employees to show up in the office for most of the workweek. Their communication seems to be working for them: **turnup rates reflect the targeted** attendance much more closely compared to those taking a more progressive approach.

Progressive approach

Achieving the targeted attendance rates seem to be more challenging for those taking the progressive approach. The progress seems to be slower as they are both locked in a push-pull relationship with labor market expectations and they're also more flexible with their expectations. There's a clear understanding that **most of them target and communicate more office attendance compared to what they can achieve.**



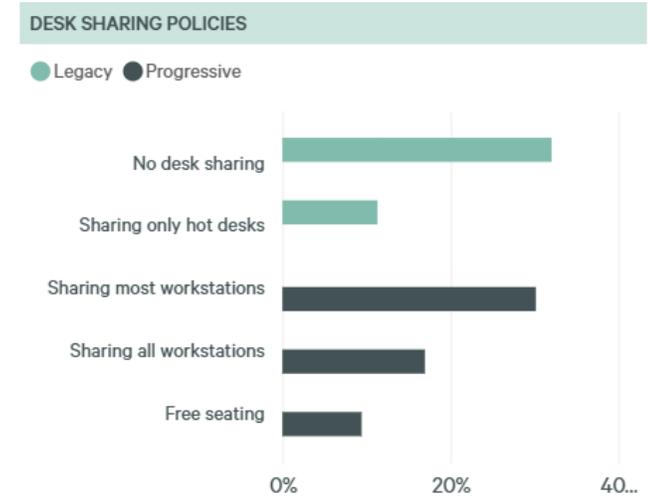
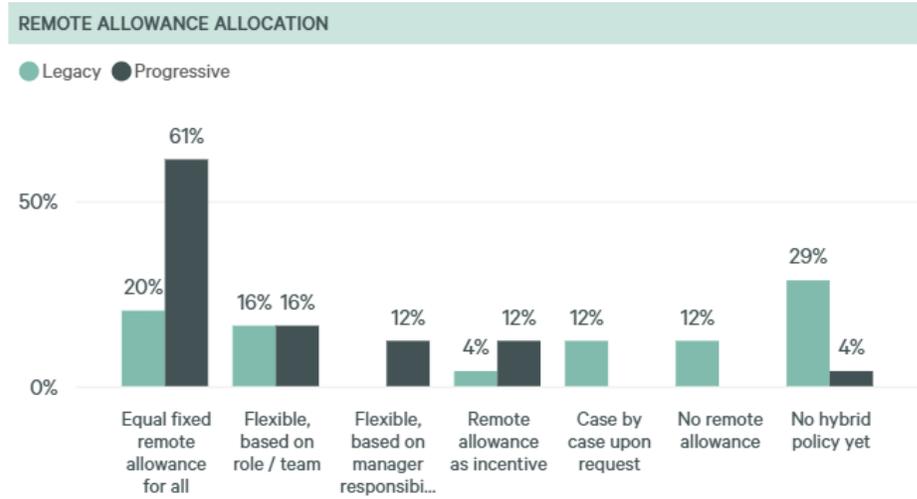
Remote work

Legacy approach

Organizations taking a legacy approach are more **selective in allowing remote work** but in exchange are **fine with allocating dedicated workstations** to employees. This, along with aiming to improve workplace experience, supports them in their **quest to attract and retain talent** on a labor market increasingly demanding at least some flexibility regarding the time and place of work.

Progressive approach

Respondents betting on the progressive route seem to be **more committed towards a democratic approach to remote**. Most of them provide equal allowance and only a few of them reported not having a hybrid policy in place or not allowing remote at all. These companies tend to **share resources to drive cost savings** and focus on improving the workplace experience in a **flight to quality** over quantity.



Hybrid drivers

Legacy approach

Internal factors seem to have the most impact on legacy companies when deciding on policies. Company culture, job functions and expectations of existing employees are amongst the most pronounced drivers behind their approach to hybrid. They seem to go down their own route, regardless of where the broader market may be heading towards.

Progressive approach

Companies taking the progressive approach react more to even what's beyond their control. Labor market and global management expectations have a bigger impact on their policies while aligning with job functions falls further behind on their agenda. They're more likely to follow workplace management trends and pilot new ideas to avoid falling behind.



Conclusion



Legacy workplace approach

Legacy companies tend to be somewhat behind the pack when it comes to deploying contemporary tools to measure utilization. Turning towards methods that deliver **more accurate and qualitative data could support these companies in reaching their attendance goals** through meeting employee expectations at the workplace.

These organizations often see the main purpose of the office in providing a company-to-employee interface: stable infrastructure, platform for professional development and focused work. They target, communicate and facilitate an office first approach, usually at the cost of being less resilient. **Allowing some more flexibility in hybrid work could further support their talent attraction** / retention efforts.

Progressive workplace approach

Progressive companies tend to be more experimental with their workplace strategies in their quest to optimize resources and are more prone to hit their limits while doing so. Instead of trying to cut all the excess real estate, **leaving a bit of buffer to accommodate future change** could result in a more resilient long-term strategy.

Companies taking a progressive approach often look at their office as a community space, fostering collaborative work and social activities. Due to the human centric nature of their approach, these organizations seem to be less confident in channeling their expectations and sometimes miss their workplace targets. Being less reactive and **committing to a more business-first approach could help them achieve their targets** in relation to workplace experience and efficiency.

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Adaptive Spaces

ARTICLE

2024-2025 CBRE Global Workplace & Occupancy Insights

OCTOBER 2024



Hybrid work has sparked a balancing act between employers and employees, with the goal of creating effective workplaces that satisfy both parties' needs. The [2024-2025 CBRE Global Workplace & Occupancy Insights](#) emphasize essential aspects: effective versus efficient metrics, strategic hybrid programs, the role of physical spaces and the transformative power of technology and AI. Taken together, these reveal a comprehensive approach to creating productive and satisfying work environments. This five-part series explores trends across major office occupiers, providing valuable insights for organizations seeking to align their workplaces with business needs and cultural objectives.



Part 1: Companies prefer metrics that measure effectiveness, rather than efficiency

Organizations are increasingly prioritizing workplace experience as a crucial factor in real estate success. Effectiveness is now more important than efficiency as a success indicator. Employee satisfaction has risen 75% in client rankings this year, eclipsing traditional metrics like density, which dropped by 67% over four years. The pandemic highlighted the need for balance between employer and employee needs, but in 2024 the focus on creating productive and mutually beneficial workplaces is more crucial than ever.

Part 2 & Part 3: What do the most effective hybrid programs have in common?

In parts 2 and 3, we explore how effective workplaces require strategic hybrid programs, which have increased in adoption by 30% over the past four years. In 2024, 92% of surveyed clients use a hybrid work model. We examine characteristics of the most popular hybrid policies: leadership expectations versus employee behaviors, mandates versus incentives and policy impact on talent retention.

Part 4: Effective work environments balance focus space and collaborative design trends

Physical aspects of the workplace are critical and complement effectiveness. To learn whether individual workspace is still shrinking in favor of collaboration space, we explore space composition trends, investigate current and forecast workplace design concepts, discuss how emerging personas are shaping the workplace and reveal a shift in portfolio rightsizing.

Part 5: AI is key to an effective technology strategy

Part 5 showcases the practical application of powerful and influential technology. We discuss AI integration trends, tech's increasing value to hybrid work and how compelling technology can optimize portfolios and improve workplace experiences. Increasingly, data points to effective technology being vital for productive workplaces.

Methodology

The 2024-2025 Global Workplace & Occupancy Insights summarize four years of office benchmarking and sentiment surveys on how CBRE clients have adapted their office environments since 2021. The study examines global data from select CBRE clients representing 375 million sq. ft./35 million sq. m. and delivers insights by portfolio size, industry/sector and region/geography.

This year, insights will be presented in five parts, followed by four articles that provide perspective.

Perspectives

1. Regional & Metro Insights
2. Sector Insights
3. Generational View
4. Looking Ahead to 2025 and Beyond

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Prieskum CBRE/Alma Career

CBRE/Alma Career

17. septembra 2025 - 30. septembra 2025

Nezaradení zamestnanci

Použité filtre:

Aký je Váš súčasný pracovný status?: Zamestnaný/-á



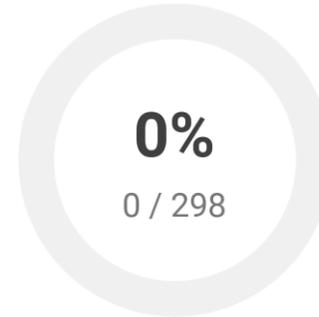
Zhrnutie



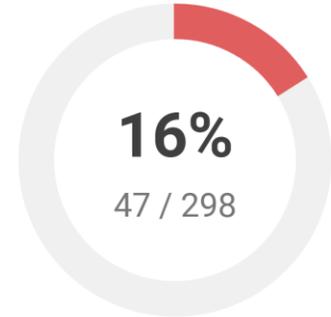
Návratnosť



Anonymne



Vyžaduje pozornosť



Prieskum CBRE/Alma Career

AI Najdôležitejšie zistenia z prieskumu

-  Mnohým zamestnancom prekáža vysoká miera hluku, nedostatok súkromia, priestory na relax a priestory na sústredenie v kanceláriách, čo môže negatívne ovplyvňovať ich pracovný komfort.
-  Viacero respondentov nie je úplne spokojných s podporou zamestnávateľa v oblasti rovnováhy medzi pracovným a osobným životom a starostlivosťou o fyzické a duševné zdravie.
-  Medzi najčastejšie chýbajúce alebo problematické prvky na pracovisku patria aj teplota v kanceláriách, ergonomické vybavenie a usporiadanie kancelárie.
-  Flexibilný pracovný čas, možnosť práce z domu a zodpovedajúce finančné ohodnotenie sú najdôležitejšie faktory pre zladenie práce a osobného života podľa väčšiny zamestnancov.
-  Väčšina zamestnancov je úplne alebo skôr spokojná s kancelárskymi priestormi, pričom oceňujú najmä dostatok svetla, poriadok a čistotu, usporiadanie kancelárie a kuchynku.
-  Viac ako polovica respondentov je úplne alebo skôr spokojných s nastavením možností práce z domu, pričom flexibilný model je pomerne rozšírený.
-  Najviac zamestnancov pracuje v administratívnych priestoroch, pričom najčastejšie sa nachádzajú v zdieľanej kancelárii alebo open space.
-  Najviac ľudí je v kancelárii v utorok a stredu, čo môže ovplyvňovať obsadenosť a atmosféru v týchto dňoch.

Výsledky

Ste:

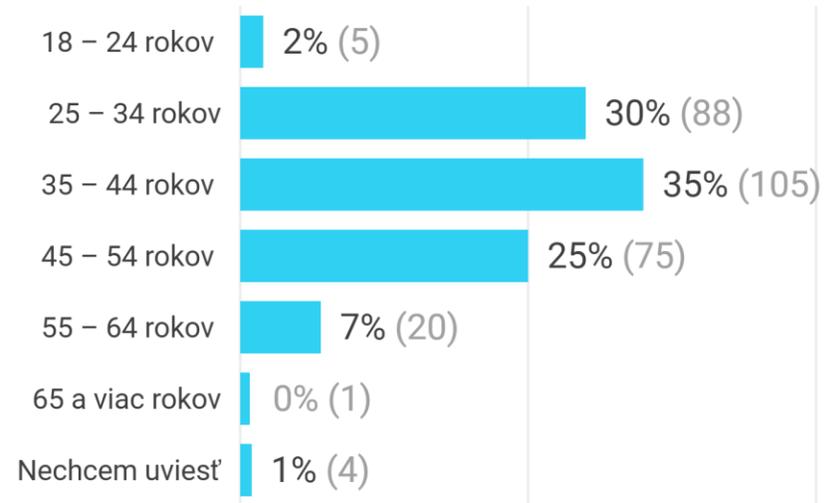
100 % (298 / 298) odpovedalo. Výber práve 1 možnosti z 3 ponúkaných.



Výsledky

Do akej vekovej kategórie patríte?

100 % (298 / 298) odpovedalo. Výber práve 1 možnosti z 7 ponúkaných.



Výsledky

Aký je Váš súčasný pracovný status?

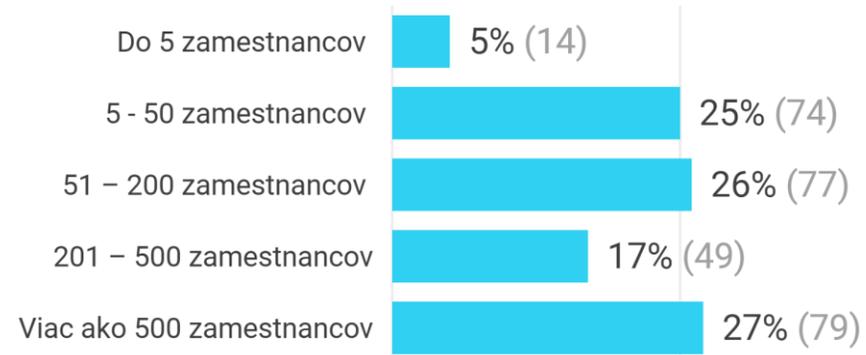
100 % (298 / 298) odpovedalo. Výber práve 1 možnosti z 6 ponúkaných.



Výsledky

Aká veľká je spoločnosť, v ktorej pracujete?

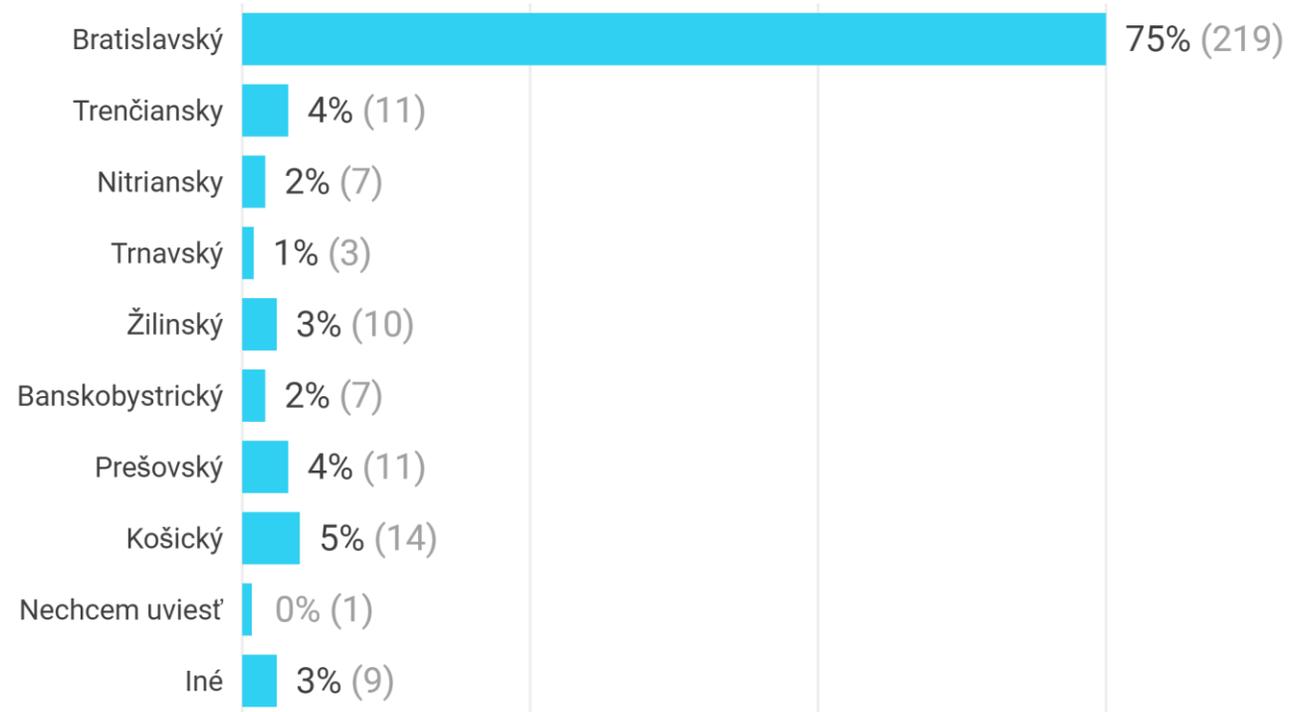
98 % (293 / 298) odpovedalo. Výber práve 1 možnosti z 5 ponúkaných.



Výsledky

V ktorom kraji pracujete?

98 % (292 / 298) odpovedalo. Výber práve 1 možnosti z 10 ponúkaných.



Výsledky

A v ktorom sektore pôsobí spoločnosť, v ktorej pracujete?

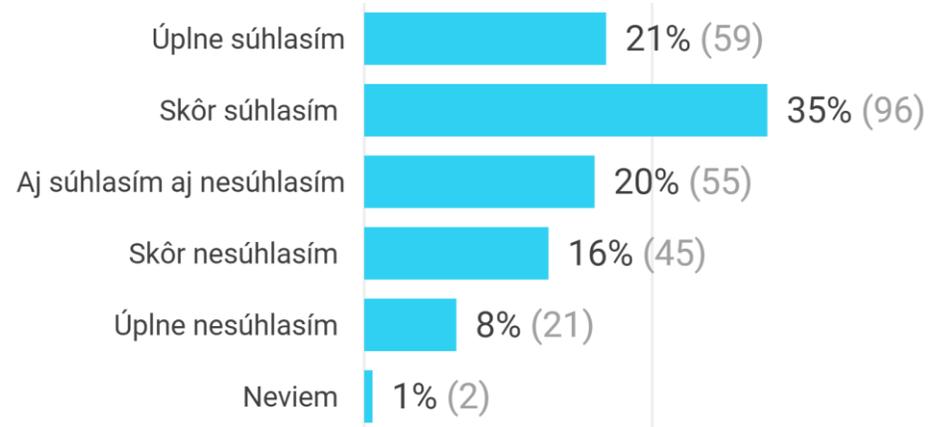
97 % (289 / 298) odpovedalo. Výber práve 1 možnosti z 12 ponúkaných.



Výsledky

Môj zamestnávateľ sa úprimne zaujíma a stará o moje fyzické aj duševné zdravie.

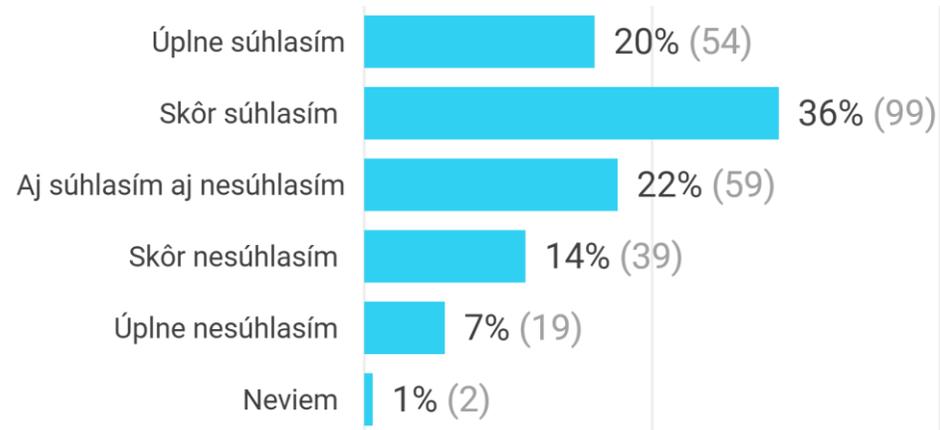
93 % (278 / 298) odpovedalo. Výber práve 1 možnosti z 6 ponúkaných.



Výsledky

Môj zamestnávateľ ma podporuje v tom, aby môj osobný a pracovný život boli zladené a v rovnováhe.

91 % (272 / 298) odpovedalo. Výber práve 1 možnosti z 6 ponúkaných.

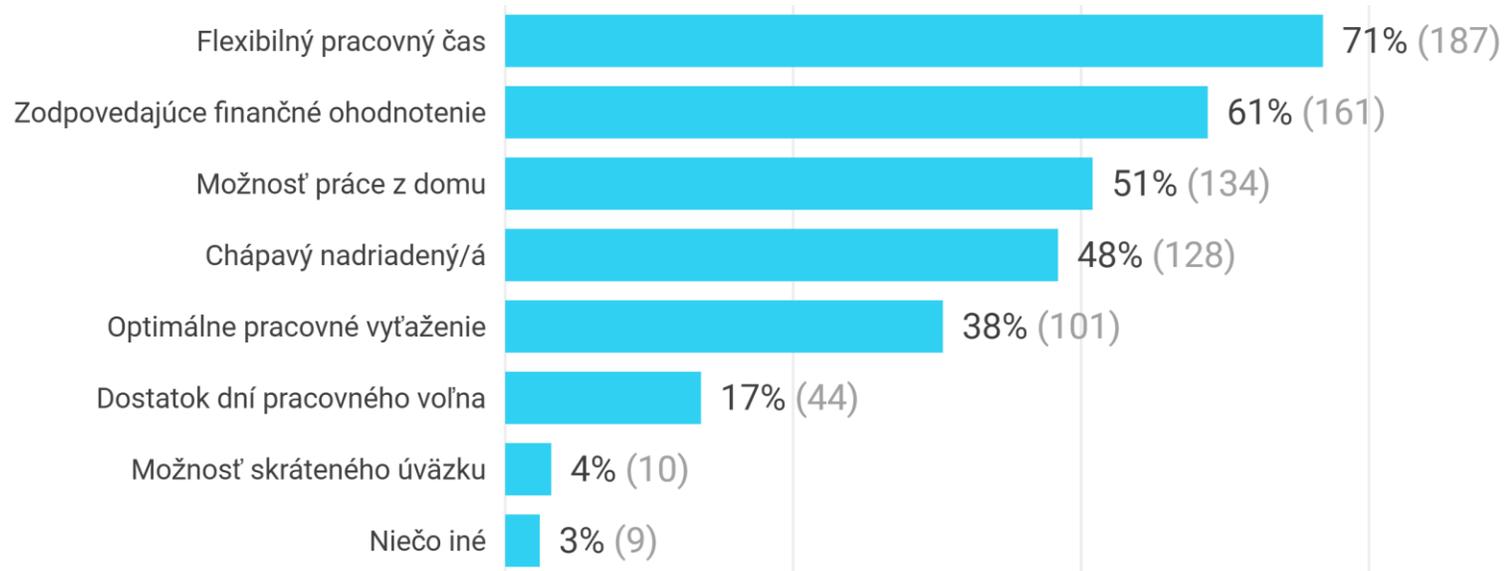


Výsledky

Dobre. A ktoré z týchto vecí sú pre Vás v zamestnaní dôležité na to, aby sa vám dobre darilo zladiť vašu prácu a osobný život?

Vyberte 3 najdôležitejšie.

89 % (265 / 298) odpovedalo. Výber viacerých možností z 8 ponúkaných.



Výsledky

Niečo iné?

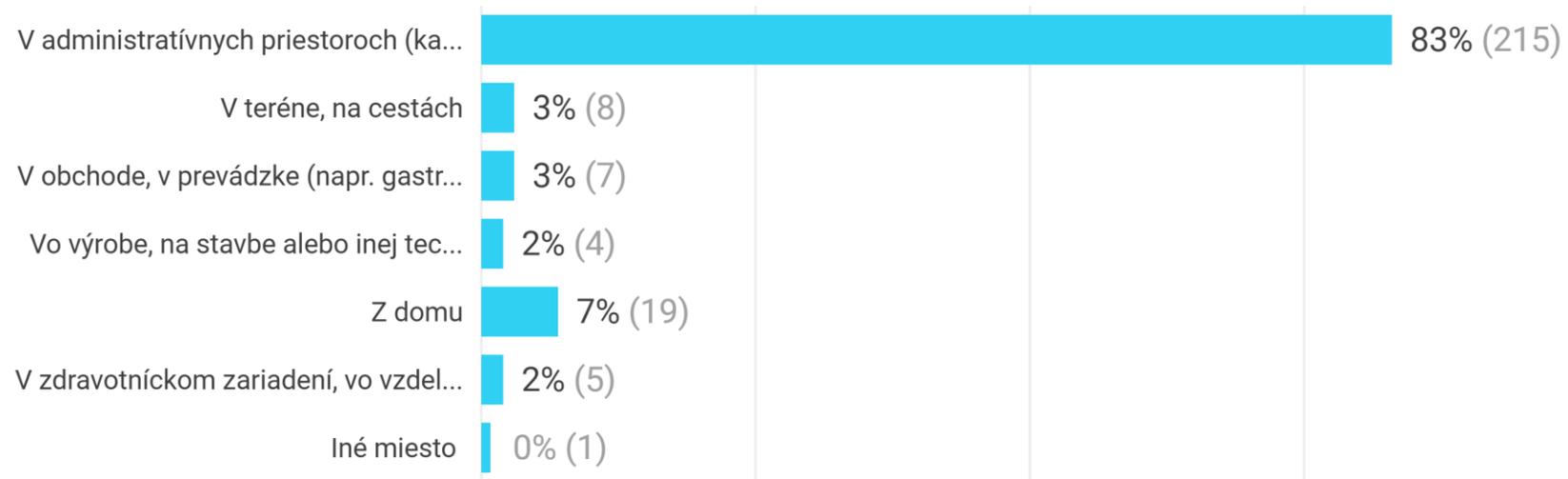
AI 3 % (9 / 298) odpovedalo. AI analýza odpovedí nižšie.

Téma	Počet odpovedí	
Atraktívne benefity	2 (23%)	
Podporná firemná kultúra	2 (23%)	
Nikam nezaradené odpovede	5 (56%)	

Výsledky

Najprv by ma však zaujímalo, kde pracujete. Ak pracujete na viacerých miestach, uveďte, kde pracujete najčastejšie.

87 % (259 / 298) odpovedalo. Výber práve 1 možnosti z 7 ponúkaných.



Výsledky

Kde inde pracujete najčastejšie?

0 % (1 / 298) odpovedalo.

Anonymne, Tím: Nezaradení
zamestnanci

„ Veľkosklad

Výsledky

Ďakujem, rozumiem tomu, že nepracujete prevažne v kancelárii, ale pracujete aspoň 2 až 3krát z kancelárskych priestorov Vášho zamestnávateľa?

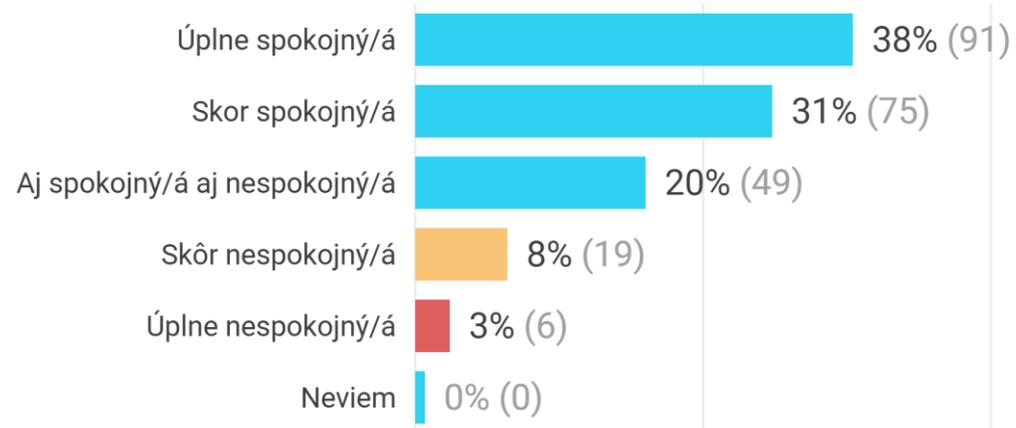
15 % (44 / 298) odpovedalo. Výber práve 1 možnosti z 2 ponúkaných.



Výsledky

Zaujímalo by ma, do akej miery ste spokojný/á s týmito kancelárskymi pracovnými priestormi.

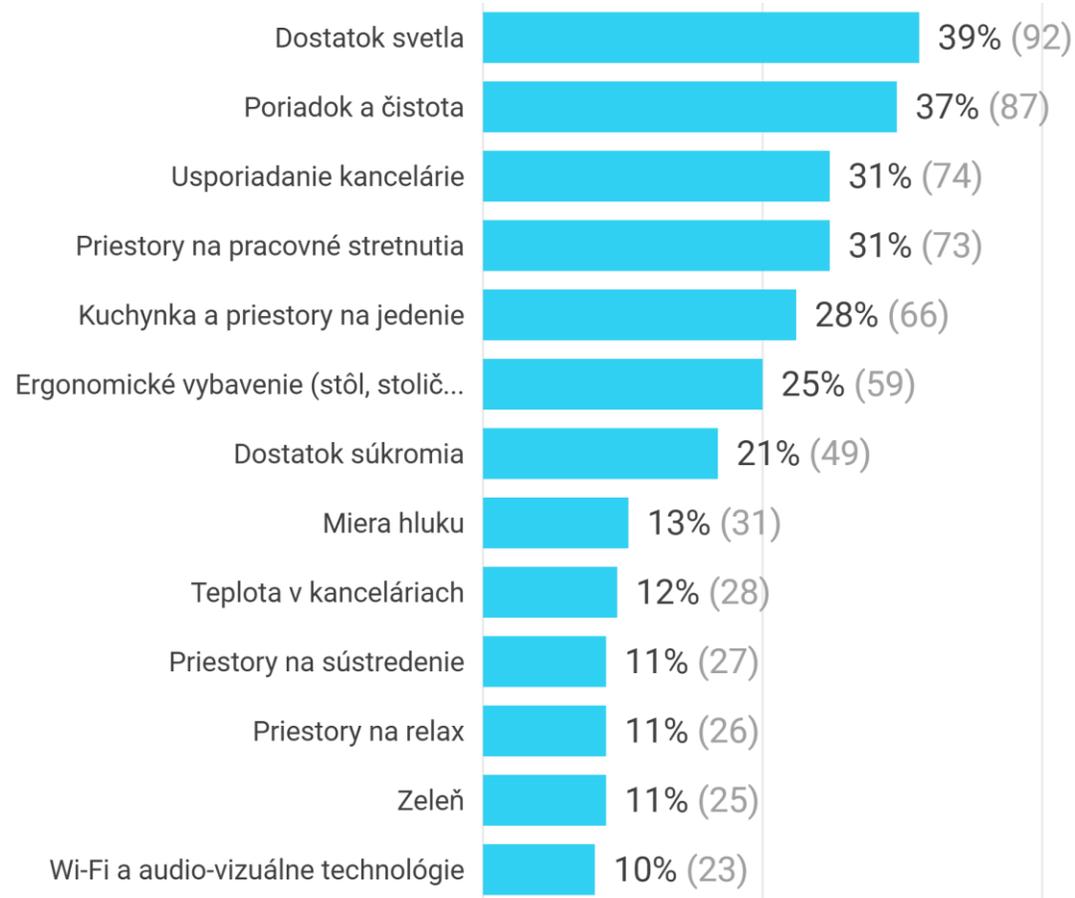
81 % (240 / 298) odpovedalo. Výber práve 1 možnosti z 6 ponúkaných.



Výsledky

Rozumiem. Čo na svojom pracovisku oceňujete najviac? Vyberte najviac 3 možnosti.

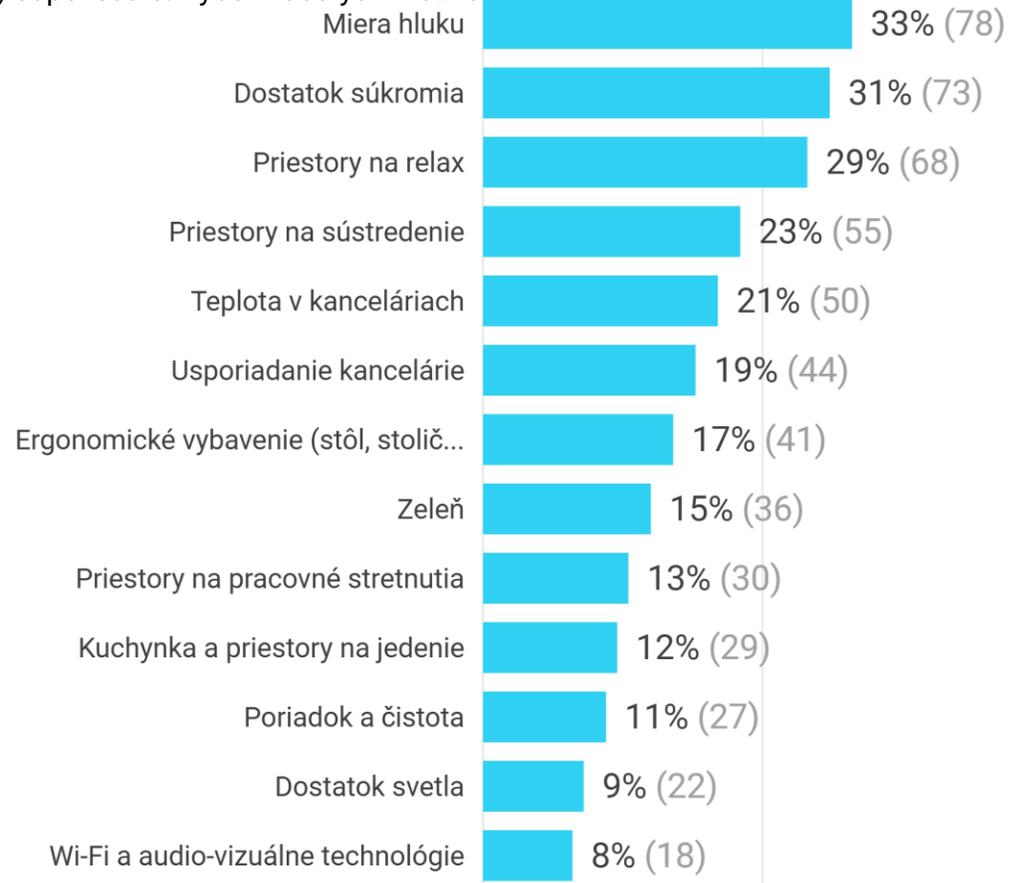
79 % (236 / 298) odpovedalo. Výber viacerých možností z 13 ponúkaných.



Výsledky

Super. A teraz sa opýtam aj na to, čo Vám naopak u Vás v kanceláriách najviac prekáža, či chýba? Vyberte prosím najviac 3 možnosti.

79 % (235 / 298) odpovedalo. Výber viacerých možností z 13 ponúkaných.



Výsledky

Upresnite mi prosím, kde sa najčastejšie nachádza vaše pracovné miesto počas pracovného dňa?

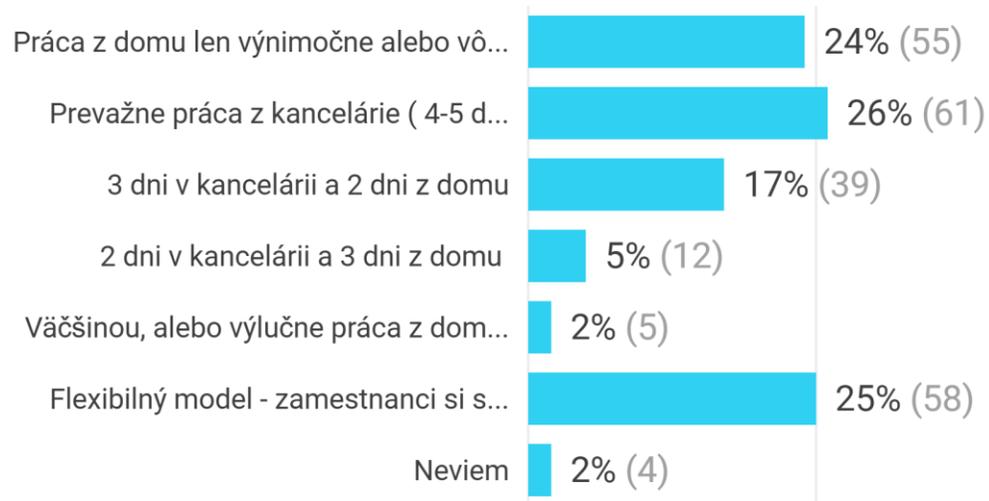
79 % (235 / 298) odpovedalo. Výber práve 1 možnosti z 3 ponúkaných.



Výsledky

Zdá sa, že som sa to už pýtal, ale upresnime si - umožňuje Vám zamestnávateľ prácu z domu?

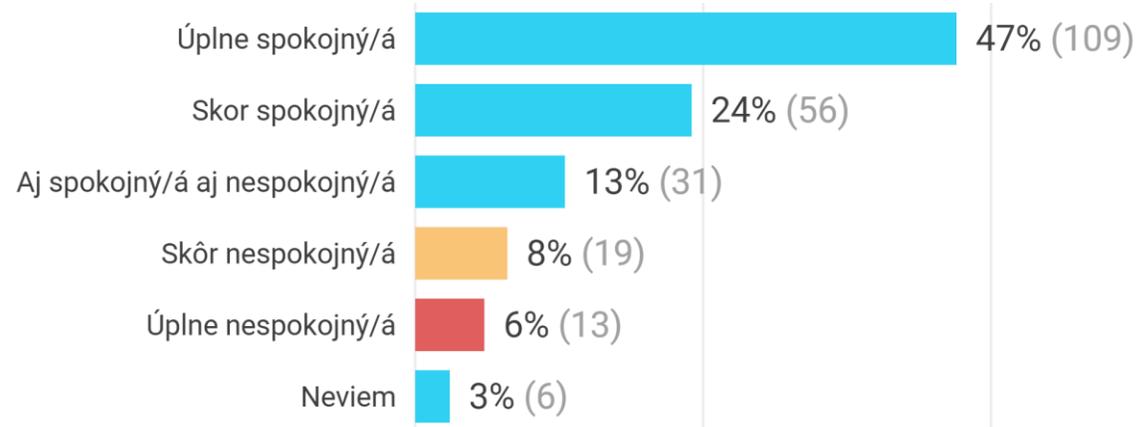
79 % (234 / 298) odpovedalo. Výber práve 1 možnosti z 7 ponúkaných.



Výsledky

Do akej miery ste s nastavením možností práce z domu spokojný/á?

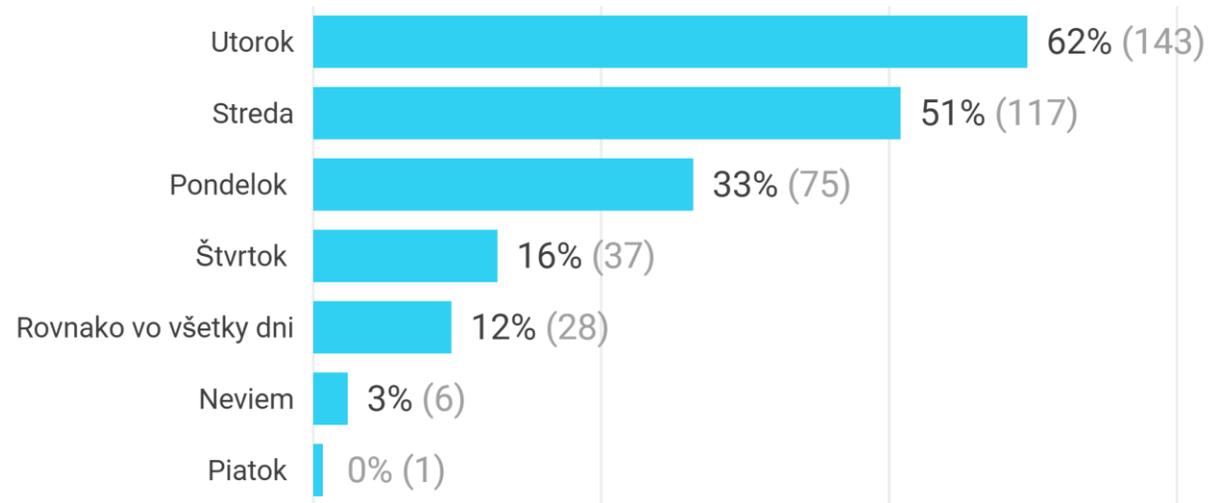
79 % (234 / 298) odpovedalo. Výber práve 1 možnosti z 6 ponúkaných.



Výsledky

V ktoré dni v týždni je podľa vás najviac ľudí v kancelárií? Vyberte najviac 2.

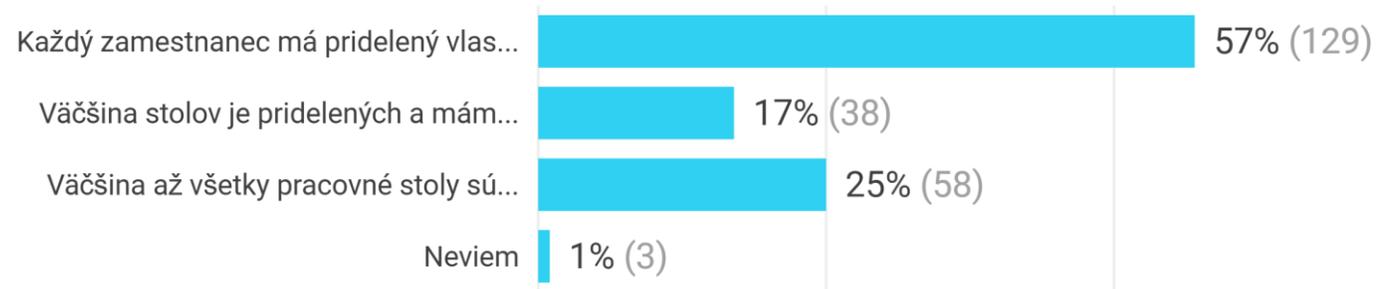
77 % (229 / 298) odpovedalo. Výber viacerých možností z 7 ponúkaných.



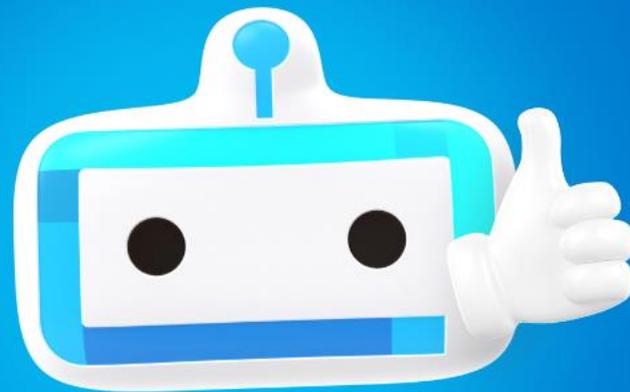
Výsledky

Ďalšia téma je zdieľanie pracovných stolov medzi zamestnancami. Aký model zdieľania pracovných stolov (desk sharing) využívate vo vašej organizácii?

77 % (228 / 298) odpovedalo. Výber práve 1 možnosti z 4 ponúkaných.



Ďakujeme za pozornosť



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